

## **USDA Weekly Retail Turkey Feature Activity**

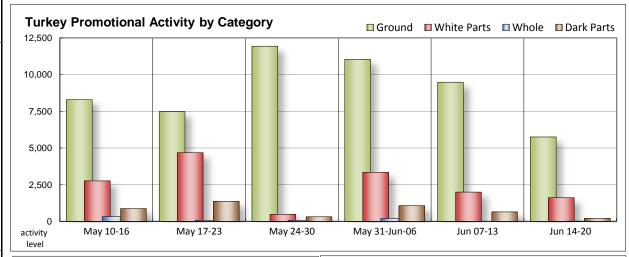
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/14 thru 06/20.

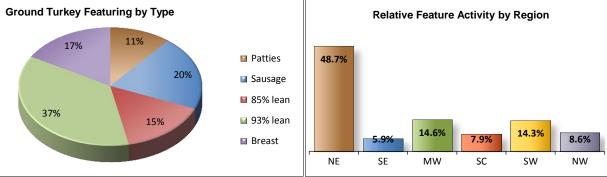
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

NATIONAL SUMMARY											
	LAST	YEAR									
Feature Rate 1/	24.2% ou	WEEK of 23,200 tlets	42.9% ou	WEEK of 23,200 tlets	33.9% of 22,500 outlets						
Special Rate 4/		2%		.7%		0%					
Activity Index 2/		690		,600	11,880						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg					
WHOLE BIRDS:											
Fresh - Hens					10	-					
- TOMS					10	1.49					
Frozen - Hens	10										
" - Toms	10	1.00									
PARTS:											
Breast:											
Bone-in, whole			50	0.05	00	0.70					
Fresh Frozen	550	1.79	560		90 590	-					
Split, bone-in	550	1.79	360	1.57	390	1.09					
Fresh			40	2.88							
Rotisserie	350	7.33	230		10	8.99					
Boneless, whole	50		70		20						
Cutlets	370		610	_	510						
			610	4.36							
Cutlets, thin sliced	130	4.99			100						
Strips					20						
Tenders	170		440		170						
Marinated Tenders	410	4.18	1,600		660						
Drumsticks			190	-	290	-					
Thighs	20	0.04	20		190						
Wings	20	2.24	270		210	1.92					
Necks	140	0.00	60 50		00	0.05					
Smoked Drumsticks	40	_	40		60 100						
Smoked Wings Smoked Necks	20	_	20		50						
GROUND TURKEY:	5,750		9,480		7,220						
Patties	630		330		480						
Sausage	1,170		2,250		2,470						
85% lean	890		1,890		340						
93% lean	2,100		3,030		1,740						
Breast	960		1,980		2,190						
Rolls (frsh/frz 1 lb.)	10		640		1,340						
Specialty 5/		<u></u>			,						
Patties	160	3.32	380	4.94	10	3.69					
93-94% lean	500		800		220						
Breast			50	5.65							
Note: rolls & specialty no	t included	l in around			hted avera	ane					

# This Week's Turkey Feature Highlights

Retail feature activity on turkey slows going into Father's Day weekend; turkey has to compete with alternative proteins that are more traditional for this weekend. Few stores show interest in promoting whole turkeys. Offerings on frozen bone-in breast are at higher prices; offerings on fresh bone-in breast disappear. Rotisserie breast featuring increases in volume, decreases in price. Offerings on boneless white parts drop sharply; prices are mostly lower. Promotional activity on dark parts is light, mostly smoked drums at higher prices. It has been a long time since offerings on ground turkey have been this slow. The 93% lean and sausage are the most actively featured grinds; prices are mixed. Fewer stores offer service and self-service deli items. Service deli offerings increase on thick slicing meats, but not enough to offset the loss in other deli meats. Self-service deli prices are mostly higher on processor brands, lower on private brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising any reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



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(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	NORTI	HEAST U.S.			SOUT	HEAST U.S.	MIDWEST U.S.					
	(CT,DE,MA,MD,N	IE,NH,NJ,NY,PA,F	RI,VT)	(A	L,FL,GA,M	S,NC,SC,TN,VA,W	/V)	(IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)				
Feature Rate <sup>1/</sup> Special Rate <sup>4/</sup> Activity Index <sup>2/</sup>	1.3% of stores w Activity	Index = 4,760	tions	0.0%	of stores v	00 sampled outle w/ no-price promo ty Index = 780	otions	23.9% of 4,200 sampled outlets 0.3% of stores w/ no-price promotions Activity Index = 1,300				
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)		Summar Stores \	ry Ntd Avg	Price Range (\$/pound)	Summ Stores	ary Wtd Avg		
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens												
" - Toms												
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.59 - 1.99	230	1.95	1.59	- 1.99	30	1.86	1.59 - 1.79	140	1.71		
Split, bone-in												
Fresh												
Rotisserie	4.99 - 8.99	330	7.29		7.99	20	7.99					
Boneless, whole	4.99	30	4.99									
Cutlets	3.99 - 4.99	190	4.90					4.69	10	4.69		
Cutlets, thin sliced	4.99	130	4.99									
Strips												
Tenders								4.69	10	4.69		
Marinated Tenders	3.73 - 4.79	160	4.62		3.73	200	3.73					
Drumsticks												
Thighs												
Wings	2.49	10	2.49		1.99	10	1.99					
Necks												
Smoked Drumsticks	1.99	20	1.99		1.97	110	1.97	2.69	10	2.69		
Smoked Wings	1.99	20	1.99		2.59	10	2.59	2.69	10	2.69		
Smoked Necks	1.99	20	1.99									
GROUND TURKEY:												
Patties	3.49	60	3.49	2.99	- 3.49	50	3.25	3.49 - 3.99	210	3.97		
Sausage	2.80 - 3.99	900	3.50		3.39	80	3.39	3.19 - 3.90	70	3.35		
85% lean	2.33 - 3.29	370	2.61	2.19	- 3.29	130	2.62	2.50 - 3.29	210	2.88		
93% lean	2.68 - 4.22	1,050	3.31	2.99	- 3.49	100	3.40	2.49 - 3.59	440	3.11		
Breast (99-100% lean)	3.99 - 6.15	580	4.92		4.61	40	4.61	3.33 - 4.99	190	3.49		
Rolls (frsh/frz 1 lb.)												
Specialty <sup>5/</sup>												
Patties	2.99 - 5.29	160	3.32									
93-94% lean	2.99 - 4.99	500	4.17									
Breast USDA Agricultural		task Banker 8 C	uniu Bandina	Na (545)				/ABAC1 O/LDCB		0 -4		

Fri. Jun 14, 2013

USDA Weekly Retail Turkey Feature Activity
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 06/14 thru 06/20.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

	SOUTH C	ENTRAL U.S.			SOUTI	HWEST U.S.		NORTHWEST U.S.				
	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX	,UT)		(C	A,HI,NV)		(AK,ID,MT,OR,WA,WY)				
Feature Rate 1/	15.6% of 4,20	0 sampled outlet	s	18.6	00 sampled outle	12.4% of 1,200 sampled outlets						
Special Rate 4/	4.9% of stores w	/ no-price promo	tions	0.0% of	// no-price promo	0.0%	0.0% of stores w/ no-price promotions					
Activity Index 2/	Activity	Index = 700			y Index = 920			Activity Index = 230				
·	Price Range	Price Range Summary			у	Price Range Summary						
	(\$/pound)	Stores V	/td Avg	(\$/poun	id)	Stores V	Vtd Avg	(\$/po	und)	Stores	Wtd Avg	
WHOLE BIRDS:												
Fresh - Hens												
" - Toms												
Frozen - Hens	1.00	10	1.00									
" - Toms	1.00	10	1.00									
PARTS:												
Breast:												
Bone-in, whole												
Fresh												
Frozen	1.49 - 1.79	150	1.60									
Split, bone-in												
Fresh												
Rotisserie												
Boneless, whole				3	3.29	20	3.29					
Cutlets	3.99	80	3.99	3	3.99	90	3.99					
Cutlets, thin sliced												
Strips												
Tenders	3.99 - 4.69	90	4.04	3	3.99	70	3.99					
Marinated Tenders			-					4.39	4.66	50	4.58	
Drumsticks												
Thighs												
Wings												
Necks												
Smoked Drumsticks												
Smoked Wings												
Smoked Necks												
GROUND TURKEY:												
Patties	3.49 - 3.50	60	3.49	3.49 - 3	.99	250	3.89					
Sausage	2.50 - 3.00	20	2.75	3.27 - 4	.69	40	4.18	3.27 -	4.69	60	4.15	
85% lean	2.47 - 2.79	170	2.52	2	2.39	10	2.39					
93% lean	2.79	20	2.79	2.79 - 3	.99	440	3.28		3.19	50		
Breast (99-100% lean)	3.33 - 4.16	80	3.74						4.79	70	4.79	
Rolls (frsh/frz 1 lb.)	3.49	10	3.49									
Specialty <sup>5/</sup>					·				·			
Patties												
93-94% lean												
Breast				Na (E4E) 20					O /I DCN4o-rl			



### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Jun 14, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/14 thru 06/20.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAF	RY			NORTHEAST U.S.		SOUTHEAST U.S.							
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(A	(AL,FL,GA,MS,NC,SC,TN,VA,WV)					
	58.8% o	f 23,200	83.5% o	f 23,200	71.8% o	f 22,500										
Feature Rate 1/	sto	res	sto	res	sto	res		78	.9% of 4,600	sampled o	utlets	52.3% of 6,100 sampled outlets				
And in the Inc. Inc. Of	40	000	40	000	40	700		Activity Index = 13,040					Activity Index = 7,780			
Activity Index 2/	40,	220	49,	260	42,	760		Price Range Summary			Price	Price Range Summary				
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		(\$/pc	ound)	Stores	Stores Wtd Avg		(\$/pound) Stores		Wtd Avg	
SERVICE DELI - Turkey																
Category 1																
Processor Brand	5,600	8.13	5,670	7.93	5,340	8.13		5.98	- 9.99	2,380	7.75	6.99	- 8.99	2,220	8.66	
Private Brand	1,860	7.80	1,290	7.16	1,910	7.81		6.99	- 8.99	1,220	8.08		7.49	110	7.49	
Category 2																
Processor Brand	5,610	5.85	4,110	5.77	4,930	6.03		4.99 -	6.99	1,720	5.83	4.99	- 6.99	710	6.29	
Private Brand	1,880	6.08	4,140	6.78	2,560	6.68		4.59 -	6.99	930	5.59		6.99	480	6.99	
Category 3																
Processor Brand	830	4.06	870	3.95	280	3.85		3.99 -		300		2.99	- 4.99	30	4.21	
Private Brand	90	5.31	140	3.99	1,450	4.97			5.48	80	5.48					
Turkey Ham																
Processor Brand	410	4.06	490	3.98	190	3.67		2.99 -	4.99	340	4.22					
Private Brand																
Turkey Pastrami																
Processor Brand	270	3.60	470	4.27	100	4.07		3.49 -	3.99	260	3.62					
Private Brand																
SERVICE DELI - Chicken																
Category 1																
Processor Brand	3,750	7.19	3,020	7.68		7.01			- 9.99	2,010		6.99	- 8.99	370	-	
Private Brand	1,730	8.11	2,550	7.20	4,100	7.32		6.49	- 7.99	360	6.99		7.99	40	7.99	
Category 2																
Processor Brand	240	4.80	930	5.58	910	6.41			4.69	170	4.69					
Private Brand	200	5.99	50	5.99	1,050	6.87										
SELF-SERVICE DELI																
(dollars per tub or pouch)																
Turkey 7-10 oz	0.000	2.04	7.400	2.00	7 740	0.47		0.00	2.00	4 450	2.22	0.00	2.50	4.000	2.00	
Processor Brand Private Brand	6,080 2,370	3.01 3.47	7,120 3,140	3.22 2.86	7,710	3.17 2.78			· 3.99 · 2.68	1,450			- 3.50 - 3.99	1,230 450		
Turkey 16 oz	2,370	3.47	3,140	2.00	820	2.10		2.50 -	2.00	20	2.59	2.49	- ა.ყყ	450	3.02	
Processor Brand	920	5.45	5.380	4.49	270	5.02		3.49 -	5.99	360	4.94		5.99	460	5.99	
Private Brand	320	5.45	3,300	4.43	210	5.02		J. <del>4</del> 3 -	0.00	300	4.34		J.33	400	3.33	
Chicken 7-10 oz																
Processor Brand	6,010	3.02	6,830	3.22	7,000	3.19		2.29 -	3.99	1,420	3.34	2.00	- 3.50	1,230	3.22	
Private Brand	,	3.47	3,060	2.91	820	2.78		_	2.68	20			- 3.99	450		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)



### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 06/14 thru 06/20.

(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	VEST U.S.	NORTHWEST U.S.			
	(IA,IL,IN,KY,MI,M	IN,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,L	A,MO,NM,OK,TX,UT)	(CA,F	HI,NV)	(AK,ID,MT,	OR,WA,WY)		
Feature Rate 1/	57.7% of 4,200 sampled outlets 46.0%			) sampled outlets	52 8% of 2 000	sampled outlets	74.7% of 1,200 sampled outlets			
		ndex = 8,160	•	ndex = 5,070	· ·	dex = 4,200	Activity Index = 1,970			
Activity Index 2/	Price Range	Summary	Price Range	Summary	Price Range	Summary	Price Range	Summary		
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg		
SERVICE DELI - Turkey	(41) 23 3)	J	(++	J	(4.1 )	J	(1,1,2,2,7)	3		
Category 1										
Processor Brand	6.49 - 8.99	390 7.34	7.99 - 10.49	370 8.26	7.99	180 7.99	6.99 - 12.99	60 8.79		
Private Brand	7.49 - 7.99	60 7.62	6.99 - 8.49	470 7.18						
Category 2										
Processor Brand	4.49 - 6.99	2,190 5.64	4.39 - 6.99	530 6.03	5.99 - 6.99	330 6.49	4.99	130 4.99		
Private Brand	5.99 - 6.99	20 6.43	6.99	50 6.99			5.99	400 5.99		
Category 3										
Processor Brand	3.29 - 4.29	130 3.90	2.99 - 3.99	100 3.86	3.99	250 3.99	3.99 - 4.99	20 4.59		
Private Brand	3.98	10 3.98								
Turkey Ham										
Processor Brand	3.29	10 3.29			2.69 - 3.59	60 3.29				
Private Brand										
Turkey Pastrami										
Processor Brand	2.99 - 3.29	10 3.15								
Private Brand										
SERVICE DELI - Chicken										
Category 1										
Processor Brand	5.99 - 9.99	550 6.87	5.99 - 6.99	620 6.08	5.99 - 7.99	190 6.19	6.99	10 6.99		
Private Brand	7.49 - 7.99	80 7.54	7.99	370 7.99	7.99 - 8.99	550 8.50	7.99 - 8.99	330 8.96		
Category 2										
Processor Brand	4.99 - 5.98	70 5.07								
Private Brand							5.99	200 5.99		
SELF-SERVICE DELI										
(dollars per tub or pouch)										
Turkey 7-10 oz										
Processor Brand	2.27 - 3.49	1,310 2.68	2.50 - 3.49	1,040 2.81	2.50 - 4.29	790 2.88	2.50 - 4.29	260 3.15		
Private Brand	2.50 - 3.99	1,020 3.19	3.99	200 3.99	2.99 - 3.99	530 3.53	3.19 - 3.99	150 3.63		
Turkey 16 oz										
Processor Brand	3.49 - 4.98	20 4.12	3.49 - 5.99	80 5.03						
Private Brand										
Chicken 7-10 oz	0.07	4.070	0.50	4.040	0.50	700	0.50	000 01=		
Processor Brand	2.27 - 3.49	1,270 2.68	2.50 - 3.49	1,040 2.81	2.50 - 4.29	790 2.88	2.50 - 4.29	260 3.15		
Private Brand	2.50 - 3.99	1,020 3.19	3.99	200 3.99	2.99 - 3.99	530 3.52	3.19 - 3.99	150 3.63		

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)